



DONATION OF SECURITIES FORM CLAREMONT EDUCATIONAL FOUNDATION

Thank you for your gift of securities to Claremont Educational Foundation (CEF).

Please fill out the information below:

Name & Type of Securities (ex: IBM common stock)	Number of Shares	Date of Transfer
Donor's Name	Broker's Name	
Donor's Street Address	Broker's Company	
Donor's City/State/Zip	Broker's Phone Number	

Donor's Phone Number (Will only be used if question arises or a problem occurs in the donation process)

Claremont Educational Foundation's **broker contact** information is:

Charles Schwab & Co., Inc.
1945 Northwestern Dr
El Paso, TX 79912

Claremont Educational Foundation's **Account Number**: 1540-3042

For electronic transfers, our Depository Trust Company (DTC) number is: 0164
This is the most secure and cost-effective way to process your gift.

Claremont Educational Foundation's tax identification number (FEIN) is: 95-4095651

After Claremont Educational Foundation receives this form and our broker confirms the donation of securities, the development staff will issue an official acknowledgment letter to the donor. This letter will indicate the number and type of shares received and date the stock was converted into a gift (day when record ownership of stock was transferred to Claremont Educational Foundation or the stock was unconditionally delivered to Claremont Educational Foundation).

Stock information can be mailed to Claremont Educational Foundation, ATTN: James Lau, 112 Harvard Avenue, Box #191, Claremont, California 91711, emailed to development@supportcef.com or called in to (909) 399-1709.

All contributions are tax- deductible to the fullest extent provided by law. Every effort will be made to sell non-marketable securities as quickly as possible. For tax purposes, the value of the stock will be an average of the high and low prices on the date of the gift. The donor should be aware of possible tax implications. Please contact your tax advisor for complete tax deductibility rules.

Please contact James Lau at Claremont Educational Foundation: (909) 399-1709 or development@supportcef.com for any questions.

Claremont Educational Foundation is a registered 501(c)(3) nonprofit organization. Contributions are tax-deductible as permitted by law.

Claremont Educational Foundation
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Claremont, CA 91711
(909) 399-1709 • SupportCEF.com